Editing Email Templates

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> This guide explains the merge tag logic for updating email templates. It is intended for system administrators.

[Email templates](https://aace6.knowledgeowl.com/help/working-with-email-template-preferences) are standardized boilerplate text you configure for various emails sent from aACE. This saves users time composing emails and also ensures a common voice and style throughout the organization. You can access email templates by navigating from aACE Main Menu > System Admin > Email Integration > Email Templates.

When you email documents directly from an aACE module, the resulting email text is populated by the assigned email template. Different documents can be sent from aACE modules:

- Estimate or Quote
- Order
- Sales Order Invoice
- Invoice
- Customer Statement
- Receipt Notification
- Packing List
- Purchase Order
- Requests for Quotes (RFQs)
- Vendor Follow-Up
- Purchase Acknowledgment
- Remittance Advice
- Commission Statement

You are able to edit email templates for your aACE system, but the process is difficult for users. To create new email templates, contact your aACE Support Representative.

By using merge tags, you can edit your email templates to use information provided on other aACE records. Merge tags can be used in any part of your email template. For example, to automatically provide your team member's name in the email, you can use the TeamMemberNameFirst merge tag in the email body. aACE populates the user's first name based on their team member record.

aACE provides a list of available merge fields for each email template. If you need a merge tag that is unavailable, contact your aACE Support Representative.

There are different merge tag conventions for the body and the header. Additionally, merge tags vary depending on the version of the aACE Email Integration your system has.

Merge Tags for Email Upgrade

Body merge fields have two types of tags: @MergeTag and @!RequiredMergeTag. There is also one type of header merge tag.

Subject and Body Merge Tags

@MergeTag Tag

Using the @MergeTag indicates to aACE the value is not required. If the value is not found when aACE populates the email, the system will create the email draft with no value for the tag. The email will be sent normally. The email can also be sent automatically without the value being populated.

@!RequiredMergeTag Tag

Using the @!RequiredMergeTag indicates to aACE the value is required. If the value is not found when aACE populates the email, the system will display an error. The email will not be sent, and the user must make edits before sending the email. The email also cannot be sent automatically without the value being populated.

Other Header Merge Fields

Merge fields used in email address fields (e.g. From, Reply-To, To, CC, and BCC) excluding the Subject should use double chevrons surrounding the merge field. For example, if the TeamMemberEmail should be CC'ed on every email, then the merge field would be <<TeamMemberEmail>>. These merge fields cannot be distinguished as required or not required.

Merge Tags for Past Email Versions

Subject and Body Merge Tags

Using the @MergeTag indicates to aACE the value is not required. If the value is not found when aACE populates the email, the system will create the email draft with no value for the tag. The email will be sent normally. The email can also be sent automatically without the value being populated.

There is no option to indicate a value is required.

Other Header Field References

The email address fields (e.g. From, Reply-To, To, CC, and BCC) excluding the Subject use field references and relationships rather than merge tags. If your organization needs to change the field references for the email address fields, contact aACE Support at Support@aacesoft.com ().

Refreshing HTML

Occasionally, the email template HTML does not load properly. You can select the Refresh icon (⟳) to reload the HTML.